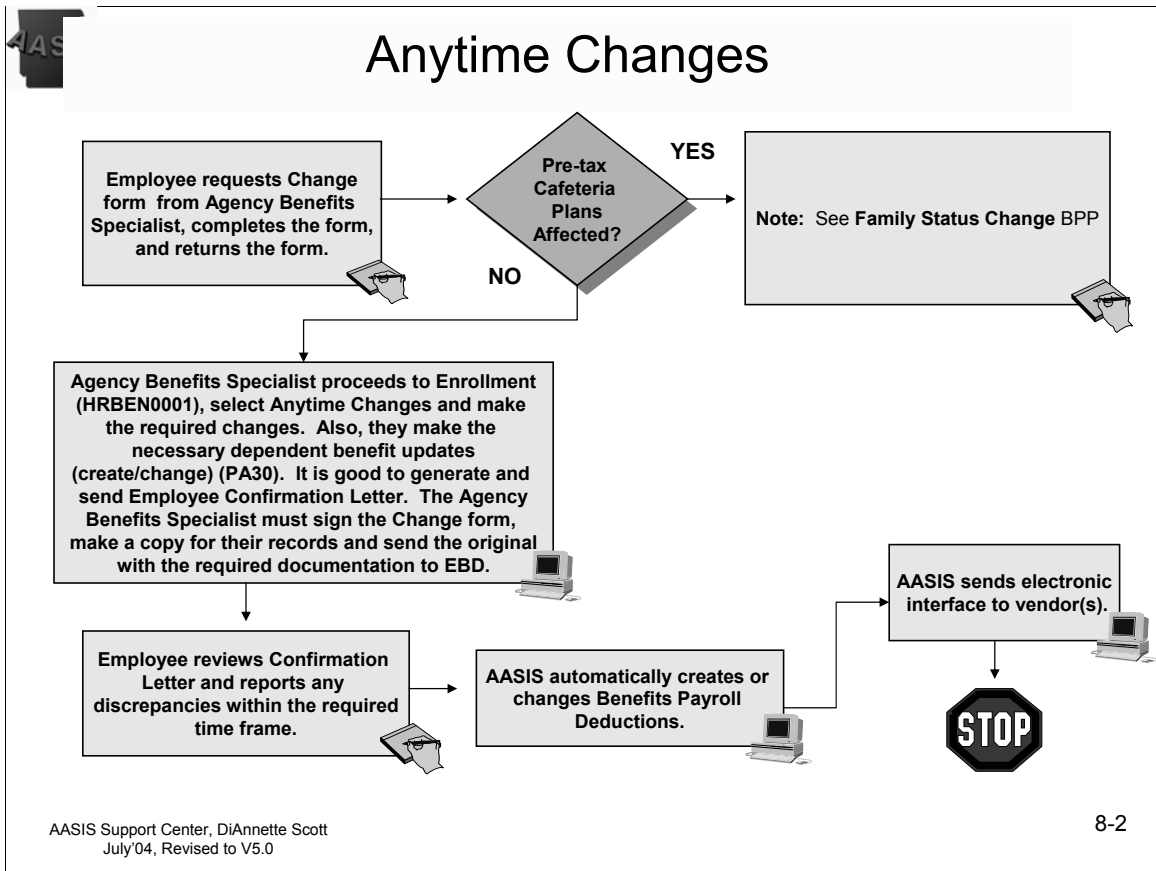




# **HRBEN**

## **BENEFITS ADMINISTRATION**

### **Chapter 8 – Anytime Changes**



*Anytime Changes* do not require you to create an Adjustment Reason.

Anytime Changes are made for the following reasons:

- Changes in Voluntary 403B Deferred Compensation Contributions
- Changes in 457 (CitiStreet) Deferred Compensation Contributions
- Stop Participation for One of Several Children

**Note:** On an increase or decrease in a Deferred Comp, you must use the begin date of the upcoming pay period. \*See OPM's Payroll calendar of dates.

The Federal Law governs 3 phases in CitiStreet:

- Regular employees (must not exceed the normal annual maximum)
- Employees over the age of 50
- Employees who are 3 years from retirement

**Note:** Employees over 50 years of age or 3 years from their Retirement can defer more money if needed, subject to IRS rules. Information about additional deferred amounts may be obtained from EBD.



## **Exercise**

### **Scenario 9**

- You have received an approved request to add an employee to Citistreet. The employee wants to contribute \$25. Add the employee's request for the Anytime Change.



## Demonstration

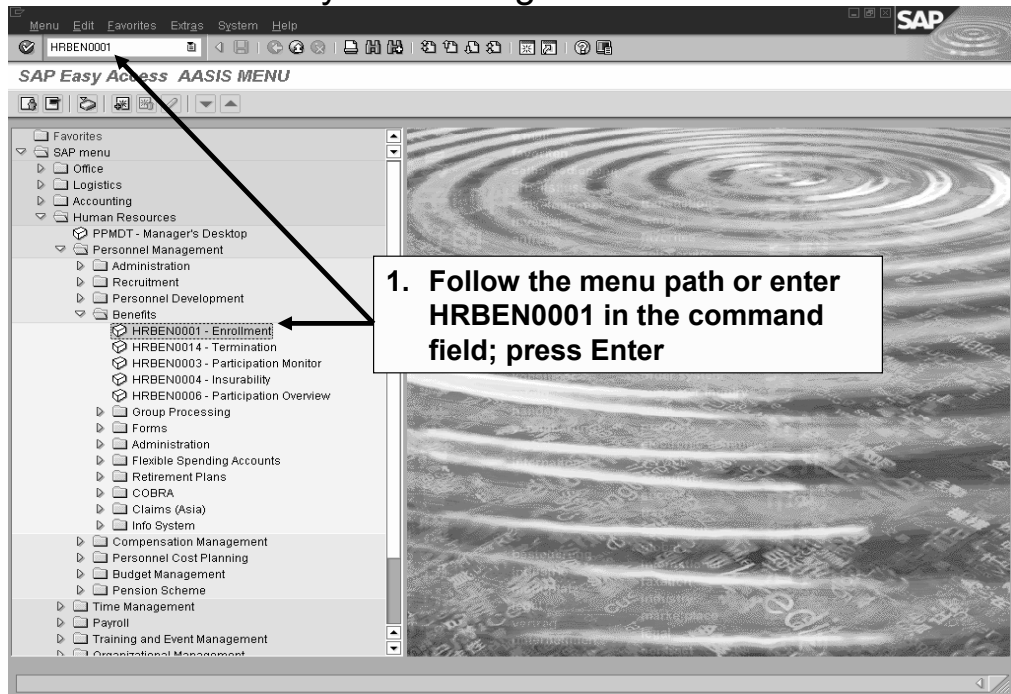
- Anytime Changes - Citistreet

Human Resource > Personnel Management >  
Benefits > Enrollment  
(**HRBEN0001/PA30**)





## Anytime Changes – Citistreet



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**Menu Path:** Human Resources>Personnel Management>Benefits>Enrollment>(HRBEN0001)



## Anytime Changes – Citistreet

Enrollment

Enrollment Edit Goto System Help

Personnel no. 1109

ID number

Select

Possible offers

Possible offers	Enrollment period
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Error list

Overview

11/30/2004

Pers. No. Name

Pers. No.	Name
1109	Kennedi Edward

2. Enter employee's personnel number

3. Select Anytime Changes



## Anytime Changes – Citistreet

SAP

Enrollment

Direct selection Selection set

Personnel no. 1109

ID number

Select

Pers.No Name

1109 Kennedi Edwards

Enroll

Name Kennedi Edwards on 11/30/2004 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Anytime changes

Enroll Costs Undo selection Error list

	Status	Validity period	Activity
Dependent Life			
US Able (Basic DEP Life ASE)		11/30/2004 - 12/31/9999	
Opt. Dep. Life			
US Able (Opt DEP Life ASE)		11/30/2004 - 12/31/9999	
Optional Life			
US Able-Opt EE Life ASE 1X/2X		11/30/2004 - 12/31/9999	
Opt. Life Post			
US Able Opt EE 1x/2x Post Tax		11/30/2004 - 12/31/9999	
401(a)			
APERS Non-Cont			
457			
457 Citistreet			
Dependent Care			
Flex Depend. Spending Acct			
Medical Care			
Flex Medical Spending Acct			

4. Double click on the appropriate Benefits elections (based upon employee elections and the rules)



## Anytime Changes – Citistreet

SAP

Enrollment

Direct selection Selection set Enroll

Maintain Savings Plan

Pers No. 1109 Kennedy Edwards  
Plan 457 Citistreet  
Start 11/30/2004 - 12/31/9999

5. Enter dollar amount

Pre-tax contribution Bi-weekly  
Amount 25.00 USD ☐ Pre-Tax Rollove  
Percentage  
Units 0 X 0.00 USD

Post-tax contribution Bi-weekly  
Amount 0.00 USD ☐ Start Pst-Tax I  
Percentage 0.00  
Units 0 X 0.00 USD

Accept

6. Click Accept

Print form Error list

Enrollment period  
01/01/1800 - 12/31/9999

Undo selection Error list

Status	Validity period	Activity
P Life ASE)	11/30/2004 - 12/31/9999	
Life ASE)	11/30/2004 - 12/31/9999	
ASE 1X/2X	11/30/2004 - 12/31/9999	
2x Post Tax	11/30/2004 - 12/31/9999	
	11/30/2004 - 12/31/9999	
	11/30/2004 - 12/31/9999	
Dependent Care		
Flex Depend. Spending Acct	11/30/2004 - 12/31/9999	
Medical Care		
Flex Medical Spending Acct	09/01/2005 - 12/31/9999	



## Anytime Changes – Citistreet

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no. 1109

ID number

Select

Pers No. Name

Pers No.	Name
1109	Kennedi Edwards

Enroll Kennedy Edwards on 11/30/2004 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Anytime changes

Enroll Costs Undo selection Error list

Dependent Life	Status	Validity period	Activity
		11/30/2004 - 12/31/9999	
		11/30/2004 - 12/31/9999	
US Able-Opt EE Life ASE 1X/2X		11/30/2004 - 12/31/9999	
Opt. Life Post		11/30/2004 - 12/31/9999	
US Able Opt EE 1x2x Post Tax		11/30/2004 - 12/31/9999	
401(a)		11/30/2004 - 12/31/9999	
APERS Non-Cont		11/30/2004 - 12/31/9999	
457		11/30/2004 - 12/31/9999	
<b>457 Citistreet</b>		11/30/2004 - 12/31/9999	✓
Dependent Care		11/30/2004 - 12/31/9999	
Flex Depend. Spending Acct		11/30/2004 - 12/31/9999	
Medical Care		09/01/2005 - 12/31/9999	
Flex Medical Spending Acct		09/01/2005 - 12/31/9999	

7. Click to enroll



## Anytime Changes – Citistreet

Enrollment

Enrollment Edit Goto System Help

Personnel no. 1109

ID number

Enroll Kenned1 Edwards on 11/30/2004 Overview

Offer selection

Confirmation of Selected Actions

List of Plans

Activity	Plan	From	To
Create	457 Citistreet	11/30/2004	12/31/9999

Note: Verify the Plan selected

Enroll Cancel

Flex Depend. Spending Acct  
Medical Care  
Flex Medical Spending Acct

Validity period Activity

Validity period	Activity
11/30/2004 - 12/31/9999	
11/30/2004 - 12/31/9999	
11/30/2004 - 12/31/9999	
11/30/2004 - 12/31/9999	
11/30/2004 - 12/31/9999	
11/30/2004 - 12/31/9999	
11/30/2004 - 12/31/9999	
11/30/2004 - 12/31/9999	
11/30/2004 - 12/31/9999	
11/30/2004 - 12/31/9999	
09/01/2005 - 12/31/9999	

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## Anytime Changes – Citistreet

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll

Name Kennedy Edwards on 11/30/2004 Overview

Personnel no. 1109

Offer selection

ID n Enrollment

Enrollment completed successfully

Continue Confirmation

Print form Error list

Enrollment period

01/01/1800 - 12/31/9999

Costs Undo selection Error list

Status	Validity period	Activity
Basic DEP Life ASE)	11/30/2004 - 12/31/9999	
Dep Life ASE)	11/30/2004 - 12/31/9999	
EE Life ASE 1X/2X	11/30/2004 - 12/31/9999	
EE 1x/2x Post Tax	11/30/2004 - 12/31/9999	
APERS Non-Cont	11/30/2004 - 12/31/9999	
457 Citistreet	11/30/2004 - 12/31/9999	✓
Dependent Care	11/30/2004 - 12/31/9999	
Flex Depend. Spending Acct	11/30/2004 - 12/31/9999	
Medical Care	09/01/2005 - 12/31/9999	
Flex Medical Spending Acct	09/01/2005 - 12/31/9999	

**9. Click Confirmation;  
Follow print instructions**



## Anytime Changes – Citistreet

Enrollment

Direct selection Selection set Enroll

Personnel no. 1109 Name Kenned1 Edwards on 11/30/2004 Overview

Offer selection

Print form Error list

Enrollment period

01/01/1800 - 12/31/9999

Costs Undo selection Error list

Status Validity period Activity

Opt. Dep. Life	11/30/2004 - 12/31/9999	
US Able (Opt DEP Life ASE)	11/30/2004 - 12/31/9999	
Optional Life	11/30/2004 - 12/31/9999	
US Able-Opt EE Life ASE 1X/2X	11/30/2004 - 12/31/9999	
Opt. Life Post	11/30/2004 - 12/31/9999	
US Able Opt EE 1x/2x Post Tax	11/30/2004 - 12/31/9999	
401(a)	11/30/2004 - 12/31/9999	
APERS Non-Cont	11/30/2004 - 12/31/9999	
457	11/30/2004 - 12/31/9999	
457 Citistreet	11/30/2004 - 12/31/9999	✓
Dependent Care	11/30/2004 - 12/31/9999	
Flex Depend. Spending Acct	11/30/2004 - 12/31/9999	
Medical Care	09/01/2005 - 12/31/9999	
Flex Medical Spending Acct	09/01/2005 - 12/31/9999	

Continue Confirmation

Enrollment completed successfully

13. Click Continue



## Questions and Answers

